

User Guide for PulseShop Sales Analysis Dashboard

1. Introduction

This user guide will help you open and use the **PulseShop Sales Analysis Dashboard**, built using Power BI. The dashboard provides a comprehensive analysis of sales performance from October 2022 to October 2024, featuring four pages (Overview, Trends Analysis, Performance Details, and Insights & Recommendations) along with interactive features like the Date Slicer and Parameter for analyzing sales and profits.

2. System Requirements

- **Power BI Desktop:** Must be installed on your device (latest version recommended). You can download it from the official website:
<https://powerbi.microsoft.com/desktop/>
- **Power BI License:** If you don't have a license, you can use the free trial version.
- **Project Files:** Ensure you have the PulseShop_Dashboard.pbix file and the data file PulseShop sales.xlsx.

3. Opening the Dashboard

1. Launch Power BI Desktop on your device.
2. Go to **File > Open**, and select the PulseShop_Dashboard.pbix file.
3. Wait for the file to load, and the default page (Overview) will open.

4. Using the Dashboard

4.1 Navigating Between Pages

- The dashboard includes four pages: Overview, Trends Analysis, Performance Details, and Insights & Recommendations.
- Use the **Page Navigator** (located on the right and left sides) to switch between pages easily.

4.2 Using Interactive Filters

- **Date Slicer:**
 - Click the calendar icon (Shape) to activate the Bookmark and display the Date Slicer panel.
 - Select the desired time period from Dim_Date (e.g., Year, Month, Quarter).

- **Additional Filters:**

- Below the Date Slicer, you'll find filters for Product_Category, Region, and Sales_Rep.
- Choose values to filter the data dynamically (e.g., a specific product category or region).

4.3 Analyzing Total Sales and Total Profit

- On the Trends Analysis page, you can toggle the display of Total Sales and Total Profit between Year, Month, or both.
- Use the Parameter dropdown to select your preferred option. If no selection is made, the visual defaults to a combined view of Year and Month.

4.4 Overview of Pages and Their Content

- **Overview:** Displays a summary of sales performance (e.g., Total Sales, Total Profit, MoM Growth) with line charts for sales and profit trends.
- **Trends Analysis:** Analyzes sales trends by hours, days, and sales representatives' performance.
- **Performance Details:** Provides detailed insights into products, regions, and customers, with comparisons of sales and returns.
- **Insights & Recommendations:** Offers key findings and actionable recommendations (e.g., targeting peak hours and launching Thursday campaigns).

5. Updating the Data

To add new data or update existing data:

1. Open the PulseShop_Dashboard.pbix file in Power BI Desktop.
2. Go to **Home > Transform Data** to open the Power Query Editor.
3. Update the PulseShop sales.xlsx file with new or modified data.
4. Click **Close & Apply** in the Power Query Editor.
5. Click **Refresh** in Power BI Desktop to update the visuals.

6. Additional Tips

- **Performance:** If the dashboard runs slowly, ensure your device has sufficient resources (RAM and CPU) to run Power BI.

- **Compatibility:** Opening the file in an older version of Power BI may cause issues. Always use the latest version.
- **Backup:** Keep a backup copy of the PulseShop_Dashboard.pbix file before making changes.

7. Technical Support

If you encounter any issues or need assistance with the dashboard, feel free to contact me:

- **Name:** Saeed Elgharbawy
- **Email:** salgharbawy2@gmail.com

Thank you for using the PulseShop Sales Analysis Dashboard!